SMARTLOADER V3 USER GUIDE

Author: Andrew Winsor

MONITOR WA PTY LTD www.monitorwa.com.au



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2 Introduction

SmartLoader V3 is designed as a self-service application, where users can easily add funds (via cash or EFTPOS) to an on-site solution used to purchase goods/services. SmartLoader V3 incorporates support for multiple-languages and configuration for different country currency configurations.

Built on MICROSOFT® .Net framework 4.5 architecture, the software supports 32bit and 64bit WINDOWS® operating system platforms.

Low system requirements allows for operation of the software on lower cost, embedded hardware platforms.

3 Features

- Ability to support multiple solutions including:
 - o PaperCut™
 - My Student Account™
 - o Total Control
 - o Pharos™
 - o Advam™
 - SafeCom™
- SIP2 Integration to ILS (Integrated Library Systems) for fine payments
- Supports multiple cash communication technologies:
 - o TL6
 - o CC-Talk
- Receipt printing with customizable labels, header and footer lines.
- Fully customizable fonts, text, buttons and colours.
- Cash pickups output to:
 - Receipt printer
 - o File
 - o E-mail
- Extensive logging capability.
- Full Multi-lingual support including the ability for customers to add support for a language not available in the default install.
- 32bit and 64bit operating system support.
- Card reader support for:
 - o Mifare ESN in 8 digit hex or 10 digit decimal
 - o Barcode
 - Mag –stripe
 - Other keyboard wedge style (HID) input device
- Customizable cash denominations to support individual country configuration.
- EFTPOS support for PCEFTPOS compatible terminals

4 Document Currency

The technical information provided in this document was current for version 3.0.1 and technically correct as of 1/11/2017.

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5 Installation

5.1 Pre-Requisites

- Microsoft .Net Framework v4.5
 SmarLoaderV3 requires Microsoft's .Net framework. SmartLoaderV3's install package will install/update this, if required, during its installation process.
- PC-Eftpos™ software
 If you intend to use an EFTPOS terminal with this software, you should first ensure the PC-EFTPOS software has been installed and tested to be functioning correctly, prior to installing this application.
- Receipt Printer
 The receipt printer functionality uses Microsoft Window's in-built print services. Please ensure you
 have a windows printer installed, and it is working correctly, if you wish to provide this functionality.

5.2 Installation Process

To start the installation process, run the installer package named "setup_SmartLoaderV3.exe".

1. Starting the installer will present you with the above screen, click [next] to continue.



Figure 4.2.1 Installation Process – Welcome setup wizard

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2. Select the desired installation location folder, or leave as the default windows program files location, then click [next].

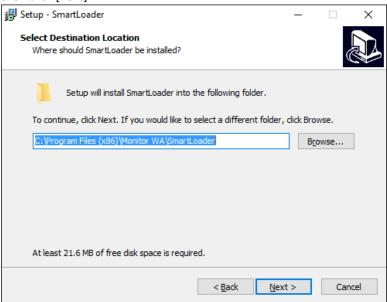


Figure 4.2.2 Installation Process – Installation Location

3. Select the shortcut folder for this program's shortcuts or click "Don't create a start menu folder" if you prefer to not to have any shortcuts. Then click [next] to continue.

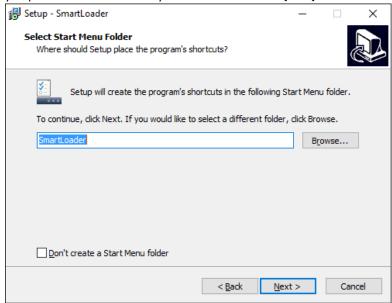


Figure 4.2.3 Installation Process – Start Menu Folder

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4. Options are given to create a desktop icon and for the software to automatically launch on start-up. Select your preferred options then click [next] to continue.

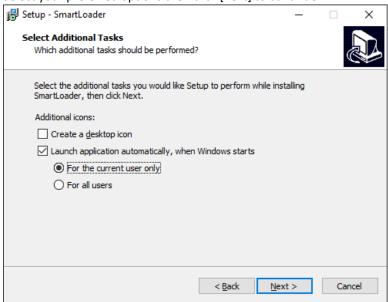


Figure 4.2.4 Installation Process – Desktop Icon

5. Click the [install] button to start the installation procedure, with your selected options.

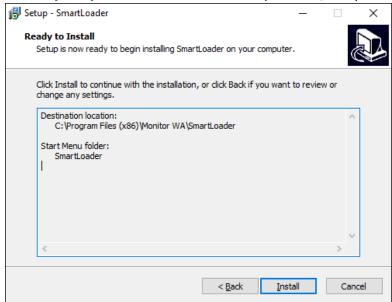


Figure 4.2.5 Installation Process – Ready to Install

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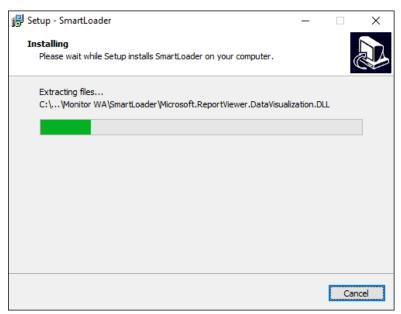


Figure 4.2.6 Installation Process – Installing (progress)

6. Now that installation has been completed, tick the box to start the configuration process.

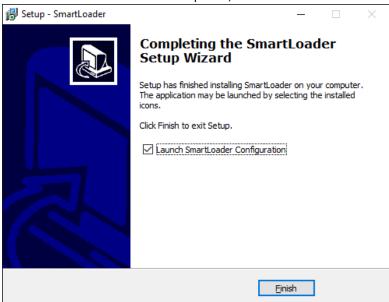


Figure 4.2.7 Installation Process – Installation Completed

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6 SmartLoader Licensing

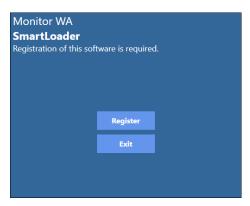
The license tab will show you the current state of the installed license.

6.1 SIP2 Module

The SIP2 module should be enabled or disabled depending on the licensed version of SmartLoader you have purchased. Incorrectly checking this box, when your product is not licensed for SIP2, may prevent the software from running. It is imperative that this is correctly selected, prior to commencing the licensing process.

6.2 Licensing

To install, or request, a license, click the "Install License File" button on this page.



You will then be shown the licensing module, click on the "Register" button to move to the next stage.

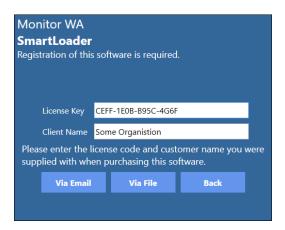


6.3 Requesting a Licensing

If you have not yet requested a license file, click on "request license"

Enter the license key you received when you purchased the software and the client name that you supplied at time of purchase.

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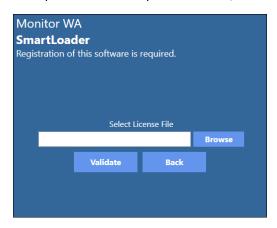


Click the "Via File" button to save the license request to a file.

Email the file to your software reseller for activation.

6.4 Activating a License

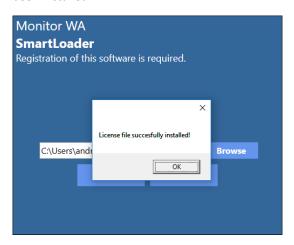
Once you have received your license file, click on the "upload license" button.



Click the "Browse" button and select your supplied license file.

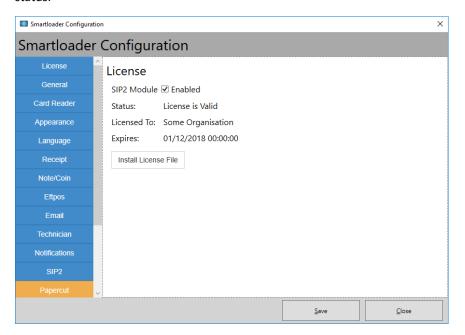
Click the "Validate" button to verify the license file and install it.

If the license process has completed, you should see a pop-up window, informing you that the license file has been installed.





Clicking OK on the dialog box, will then take you back to the configuration application and display the license status.



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7 SmartLoader Configuration

7.1 General Settings

1. Debug Mode

Check this option on, when requested to by support personnel to increase the level of logging performed by the application to assist with diagnosing technical faults.

2. Timeout

The time-out settings here (in seconds) is used through-out the software. When there is a screen waiting for a user action, this time-out amount is applied. If no user action has been received in this time, the action is cancelled.

An example is wanting for the user to confirm if they want a receipt printed. If the user hasn't pressed either button to confirm or deny the printing of the receipt, when this time-out limit is reached the screen will perform the default action (not print a receipt) and carry on to the next window in the process flow.

3. Terms and Conditions

Enabling this option, allows you to provide the application a path to a Rich Text File (RTF). When a user authenticates at the SmartLoader software, they will be displayed the supplied RTF file, and be provided the option to agree to the conditions, prior to performing any transaction.

4. Contact Support Message

This message is displayed to the user when the Software is in an error state. An example error state is where it cannot connect to the required solution to check the user's account balance. In this instance, the specific error is displayed on-screen to the user.

This custom message would then be displayed below it, and contain a more site specific message like "please contact IT Helpdesk on xxxx", or something similar.

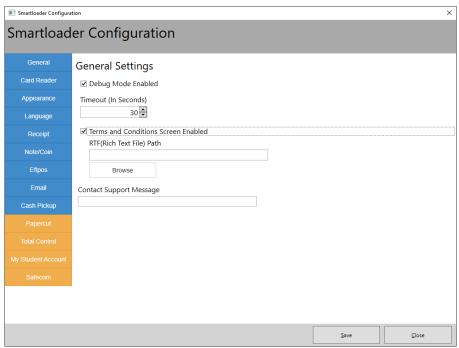


Figure 6.1. General Configuration Settings

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7.2 Card Reader Settings

7.2.1 Keyboard Emulation

SmartLoader software supports card readers with Human Interface Device (HID) keyboard emulation mode. It is recommended that the hardware be configured to output a carriage return at the end of a card read.

This can then be further customized to ensure quality of card read, by specifying additional options like below:

1) Minimum Length

The minimum length for a valid card number. This length excludes the header and footer characters and can be the same number as the maximum length where the site only has one fixed length for all cards.

2) Maximum Length

The maximum length for a valid card number. This length excludes the header and footer characters and can be the same number as the minimum length where the site only has one fixed length for all cards. Any numbers read after this maximum length are ignored.

3) Header Character

Used to designate the start of a card number, some card readers may prefix their card numbers with this character. This character will be stripped from the card number read.

4) Footer Character

Used to designate the start of a card number, some card readers may prefix their card numbers with this character. This character will be stripped from the card number read.

5) Timeout

This value should not be required to be changed from the default of 100 milliseconds. This is the maximum amount of time from the first character read, to the last character read, which the application will wait for all characters to be received, prior to translating and processing the number.

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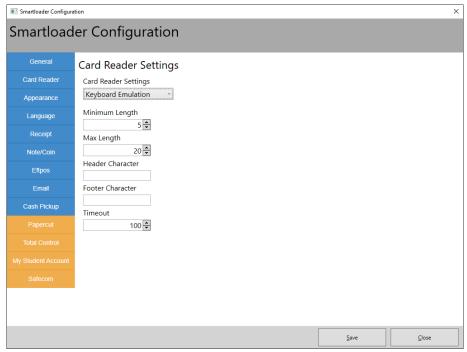


Figure 6.2.1 Card Reader Settings – Keyboard Emulation

7.2.2 Monitor WA OEM Mifare®

Only select this card reader option, if you are using a specialised OEM card reader supplied by Monitor WA. These readers do not require a specific driver, but the reader should be checked within the Windows operating system, that it has installed correctly. No specific configuration is required for these readers.

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7.3 Appearance

The visual appearance of the software can be modified according to the re-seller/client's individual requirements.

Care should be taken, to ensure all screens and controls are easy viewable by the user. Font sizes and button sizes can be adjusted to support different sized screens. The start screen font colour and panel colour can be set different to the rest of the screens. To use a transparent background colour, select the transparent colour from the "standard colour" tab in the colour picker.

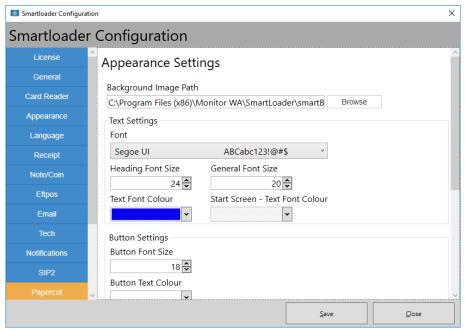


Figure 6.3.1 Card Reader Settings – Keyboard Emulation

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7.4 Language Settings

SmartLoader V3 can support multiple languages. Multiple languages can be enabled, where required. When more than one language is supported, the software will display a country flag, for each enabled language. The user needs to only press this flag to have the language changed for their individual session.

When the session has ended, the software will revert to the language that is specified as the default.

1) Currency Type

As the software supports different currency type, this option here will change the way currency types are displayed to the user, by implementing the currency display rules for that type. E.g. the application supports different currency types, but you cannot accept more than one currency type per application installation. Ensure you select the correct currency type for the location of your installation.

Please note: If you currency type is not listed, contact our support team, with a request for your currency type to be added to the supported types.

2) Default Language

This is the main language that the software will display prompts in, without having to select another language. Ensure that the default language, matches the language that the majority of your users converse in.

3) Enabled Languages

In this area, you will see a list of all languages that are supported by the software.

Tick-on any languages that you need to make available to your users. You shouldn't simply add all languages if there is no need for them. As it clutters up the screen with additional icons that won't be used and will cause more confusion to the users.

Please Note: Additional languages can easily be added to the software. Please contact us, if you have a need for another language to be supported and we can assist with adding this.

The language files can also be used to change the prompt text displayed in certain areas of the software. To change the text, you will need to manually open the required language reference file. This is normally installed in "[program install folder]\resource\StringResources\" then the filename based on the language code.

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7.5 Receipt Settings

Receipt printing can be enabled or disabled, depending on the presence of a receipt printer. The software has been configured to support a receipt printer of 80mm width. Any printer with a larger width, will still work, but will result in paper wastage.

A receipt printer with a smaller width will cause information to not be printed correctly.

The software allows you customize the header and footer text of the message, as well as the option to print the account name and card number on the receipt.

As per the pre-requisites, ensure you have already installed your receipt printer as per standard windows printing configuration and that it is functioning correctly

- Receipt Enabled
 Tick this box to enabled receipt printing options to be available.
- Printer Name
 Drop-down selection list of all installed Windows printer objects.
- Show Account Name
 Check this box to add the account name to the receipt, this will assist in handling erroneous or missing transaction information.
- 4) Show Card Number
 Card numbers can be shown on the receipt if they do not compromise the security of the account holder's funds. Enabling this option can also assist in trouble-shooting system problems.

*From v3.1 onwards, receipt header and footer lines are stored in the language file. To ensure users receive a receipt with wording in their selected language.

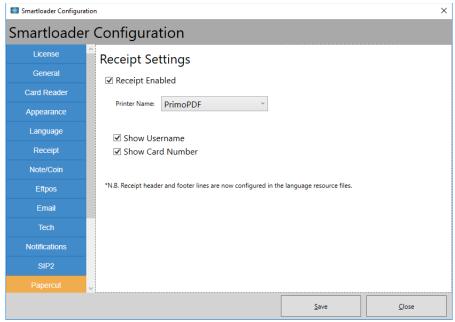


Figure 6.5 Receipt Settings

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7.6 Note/Coin

Support has been built for two different communications methods, namely:

- TL6
- CC-Talk

The TL-6 is a USB device that is installed between the note and coin validators. When this device is used, the software only needs to communicate with this single device on a single comport.

CC-Talk can support multiple devices on a single-comport, but the software itself will only support a single validator per com port. This means you needs to ensure each validator has been wired to its own comport, and that you know which comport each validator is plugged into.

7.6.1 TL6 Configuration

- 1) Select the com port the TL6 is plugged into
- 2) Select which configuration type of note/coin

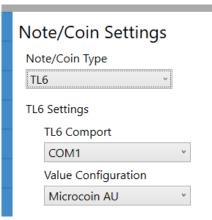


Figure 6.6.1 TL-6 Configuration

7.6.2 ccTalk Configuration

- 1) Enable the coin validator if there is one installed
 - a. Select the comport the coin validator is connected to
 - b. Select the configuration type of the note validator
- 2) Enable the note validator if there is one installed
 - a. Select the comport the note validator is connected to
 - b. Select the configuration type of the note validator

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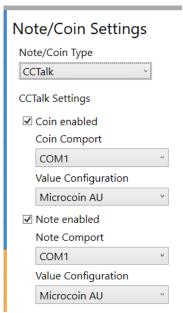


Figure 6.6.2 TL-6 Configuration

7.6.3 Supporting Different Validator Types

We can incorporate different validators and configurations into the software where required. Please contact our support staff for assistance with this.

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7.7 EFTPOS

EFTPOS transactions can be supported by the software provided the software can communicate to the terminal. In Australia, banks allow EFTPOS terminals to be communicated through the use of a third-party software named PC-EFTPOS. The software requires that you have an EFTPOS terminal pre-configured by your required bank, with PC-EFTPOS support.

It is also a pre-requisite, that the PC-EFTPOS software is installed on the same computer as the SmartLoader software, so it can perform the required communications.

Once this has been done, EFTPOS payments can be accepted by enabling this option and configuring the quick value buttons.

Up to 6 quick value buttons can be enabled and assigned a value. When a quick value button is enabled, it allows the user to press that button for that amount of funds. Additional button presses will add that amount to the transaction total, until the desired amount has been reached.

The following 2 diagrams is an illustration of how the quick value amounts were configured and how this is then displayed to the user at the desired point.

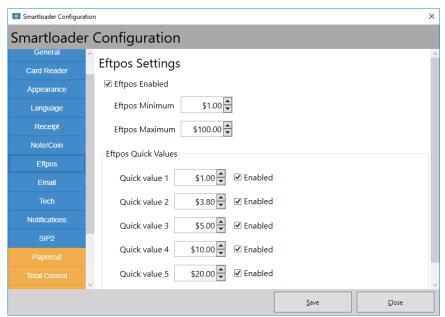


Figure 6.7.1 EFTPOS Configuration

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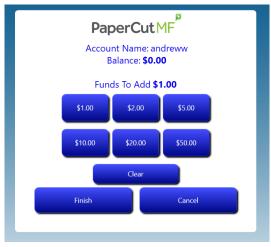


Figure 6.7.2 EFTPOS user screen

7.8 Email

- 1) Email Enabled
 - a. Check this box to enable email via SMTP
 - b. Set the required SMTP Server Address
 - c. Set the required SMTP Email Address
 - d. Set the required SMTP Username
 - e. Set the required SMTP Password
- 2) Email Receipt Errors
 - a. Set the Email address that receipt errors will be delivered to
- 3) Email Note/Coin Errors
 - a. Set the email address that note & coin errors will be delivered to
- 4) Email Deposit Failures
 - a. Set the email address that account deposit failures will be delivered to

Enter in a test email address and click the "Send Test Email" button to send a test email to that email address.

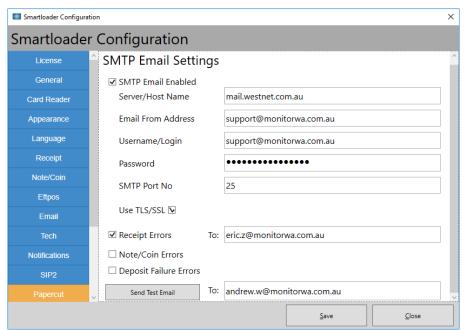


Figure 6.8 Email Configuration



7.9 Tech

The tech settings allow for a cash pickup card access to be different from a technician card access. Technician cards will let the card holder perform various testing and access to the software and machine. The cash pickup card can also have access to this, however it can also be configured to only perform a cash pickup, with minimal user prompts.

1) Cash Pickup Settings

Card Number Set the card number that is to be used for cash pickup's. Multiple cards can be

specified by separating them with a comma [,].

Auto-Run Tick this box, to automatically perform the cash pickup function and reduce user

interaction when performing a cash pickup.

Email Recipients enter the email address to send the cash pickup file to. Use a semi-colon character

[;] to separate multiple address destinations.

Folder Location the folder location to store the cash pickup files can be customized here. Click the

browse button to use a folder browse dialog to locate the desired location.

2) Tech Settings

Card Number Set the card number that is to be used for technician access to the device. Multiple

cards can be specified by separating them with a comma [,].

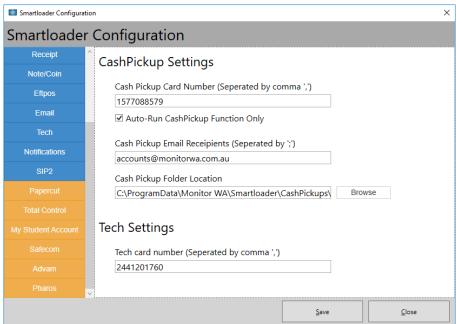


Figure 6.9 Tech Configuration

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7.10 SIP2

The SIP2 interface enables integration with an Integrated Library System (ILS) to support the payment of fines, through the SmartLoader software. The ILS may require a license for each device that connects via the SIP2 interface and may require a device to be configured for each SmartLoader.

If SIP2 is enabled in the SmartLoader software, a new license will be required to enable this interface.

SmartLoader SIP2 integration has been tested with the following ILS software:

Koha v17.05.05.000

SIP Server IP Address

3) Cash Pickup Settings

Card Number Set the card number that is to be used for cash pickup's. Multiple cards can be

specified by separating them with a comma [,].

Auto-Run Tick this box, to automatically perform the cash pickup function and reduce user

interaction when performing a cash pickup.

Email Recipients enter the email address to send the cash pickup file to. Use a semi-colon character

[;] to separate multiple address destinations.

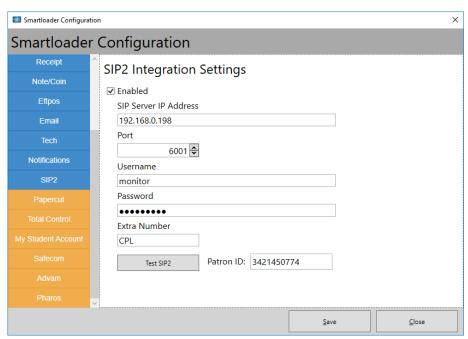


Figure 6.10 SIP2 Configuration



8 Solution Configuration

8.1 PaperCut

To enable the SmartLoader software to connect to PaperCut MF™, you require an available Monitor WA kiosk license in PaperCut.

Enabled click to enable the PaperCut integration

Host enter the full html address required for the papercut external device connection

e.g. http://papercutserver:port/rpc/extdevice/xmlrpc

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 Check this box to allow SIP2 payments to be made from this account.

Narration If SIP2 is enabled, you can set a narration on the PaperCut transaction.

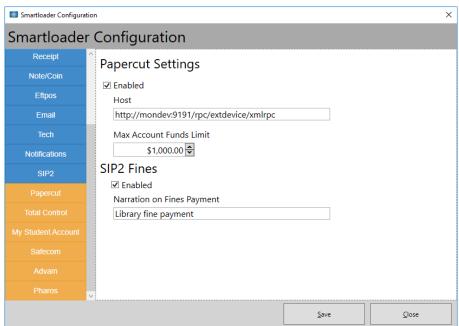


Figure 7.1 PaperCut Configuration

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8.2 Total Control

SmartLoader can be used to add funds to Monitor WA's Total Control (TC) solution. A device license is required for each SmartLoader connecting to the Total Control solution.

Enabled click to enable the TotalControl integration

Host enter the full html address required for the total control external device connection

e.g. http://tcserver:port/TotalControl.rem

Key use the API key provided by your reseller

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 SIP2 integration is not supported with the Total Control solution.

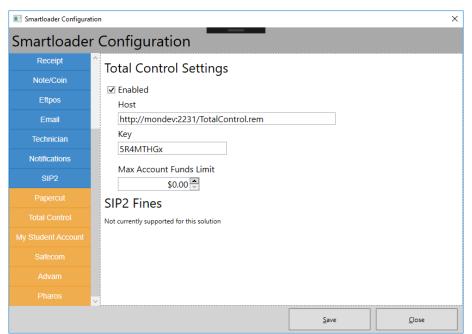


Figure 7.2 TotalControl Configuration

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8.3 My Student Account

Enabled click to enable the MyStudentAccount (MSA) integration

Host enter the full html address required for the MSA device connection

e.g. http://MSAservername

Key use the API key provided by your reseller

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 SIP2 integration is not supported with the Total Control solution.

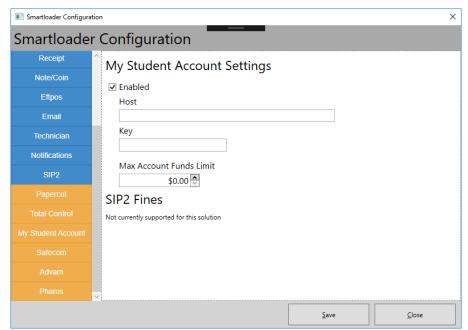


Figure 6.3 1 My Student Account Configuration

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8.4 SafeCom™

For SafeCom™ integration, the SafeCom client must be installed on the SmartLoader PC.

Enabled click to enable the SafeCom integration

Domain the SafeCom domain name that this SmartLoader connects to

Group Name the group that this SmartLoader device has been configured to in SafeCom

Executable Path the path to the SafeCom client executable that has been installed on this device

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 SIP2 integration is currently not supported with the SafeCom solution.

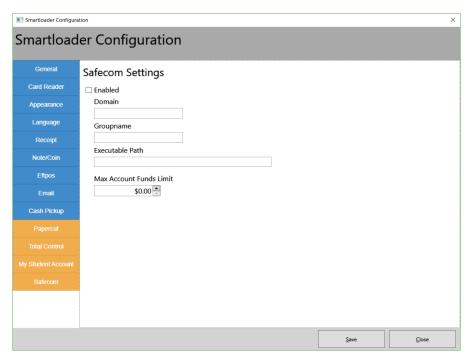


Figure 6.4 1 SafeCom Configuration

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8.5 Advam™

Enabled click to enable the Advam™ solution integration

Primary Server enter the full html address required for the Advam server

e.g. http://AdvamPrimaryServername

Secondary Server enter the full html address required for the secondary server. This is required for

redundancy and to minimize connection issues.

e.g. http://AdvamPrimaryServername

User Name enter the username required to login to Advam

Password enter the current password for the user

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 SIP2 integration is not supported with the Advam solution.

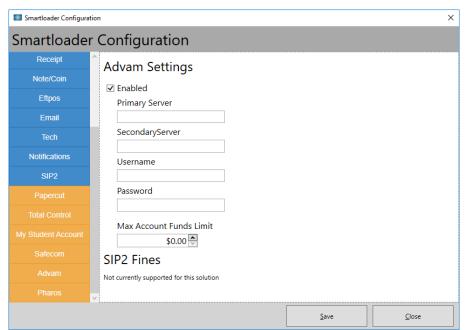


Figure 7.5 Advam Configuration



8.6 Pharos™

Enabled click to enable the Pharos™ solution integration

Server address enter the full html address required for the Pharos external device connection

e.g. http://ipaddress/pharosedi/ediservice.asmx

Terminal Name enter the required name for this terminal that matches the device in the Pharos

configuration.

Site Password enter the password for the Pharos site

Cashier Account enter the account name of the cashier account that funds are credited to.

e.g. edicashier

Max Account use this field to set a limit on the amount of funds that a user can add to their

papercut account. N.B. that when a user is adding cash, a note/coin will be accepted

and may take them over this limit.

SIP2 Check this on to enable SIP2 integration. No further configuration is required. Any

fines payments will be shown in Pharos as a negative account adjustment.

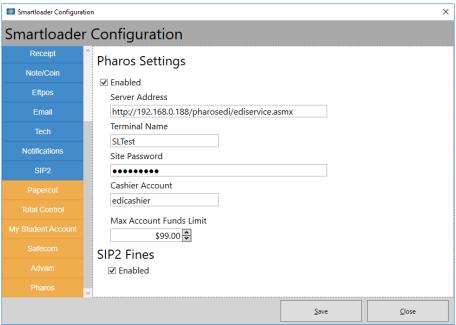


Figure 7.6 Pharos Configuration

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